

Estate Planning Checklist

What can I do to make the transfer of my benefits to my beneficiary as simple as possible?

- ☐ Make sure DRS has a current Beneficiary Designation form on file.
- ☐ Complete and file this form with your other legal documents (will, living will, durable power of attorney, etc.).
- ☐ Make sure your designated beneficiary knows where they are kept.

What do my Survivors need to do?

If a member or designated beneficiary dies, please contact DRS. This contact will allow DRS to mail the appropriate paperwork, begin the transfer of benefits process (if applicable) and will help prevent overpayment.

Department of Retirement Systems
Toll Free: 1-800-547-6657 Olympia: (360) 664-7000
PO Box 48380
Olympia, WA 98504-8380

DRS will ask your beneficiary to:

- Provide DRS with a copy of your death certificate
- Complete and sign applicable forms* using the information below

☐ My full legal name (last, first and middle): _____

☐ My Social Security Number: _____

☐ My retirement system and plan: _____

(PERS Plan 1, 2 or 3; TRS Plan 1, 2 or 3; SERS Plan 2 or 3; LEOFF Plan 1 or 2; WSPRS Plan 1 or 2)

☐ A copy of my marriage certificate is located: _____

☐ Full names of eligible** child(ren):

_____ Date of Birth _____ Social Security Number _____

_____ Date of Birth _____ Social Security Number _____

_____ Date of Birth _____ Social Security Number _____

☐ Name of Guardian of eligible** child(ren): _____

Address: _____

Phone: _____

* Mailed to your beneficiary after he or she contacts DRS

** See your Plan Handbook for eligibility requirements